OCLC Incentive Program update, discussion, next steps
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Following the presentation, the following were the questions presented for table discussion:

For delegates whose organization currently participates in the incentive program,
• How does the current incentive program influence your participation in OCLC, if at all?

For all delegates,
• Which, if any, of the OCLC Shared Values and Membership Principles does the current incentive program advance?
• If the Cooperative were to establish a new incentive program, what factors should be considered?

COMMENTS RECEIVED AND CATEGORIZED

Influence of current incentive program
• We get a monthly report where credits are reviewed. This is very driven by GWILA; there are metrics that we must live by in addition to OCLC incentives.
• In one department, credits provide a 25% offset of costs in their cataloging department.
• Credits aren’t a motivator for the original contribution (we would do that anyway), but they are for enhancements to master records.
• Some institutions constructed their workflows to get credits from OCLC.
• These don’t matter much to smaller institutions.
• It is not impacting behavior; we are pleased it’s there, but we do it out of commitment.
• This could not be applied globally - - it would be too expensive.
• Credits program does not drive the behavior in most circumstances
• If subscriptions were configured to reflected credits at this time and then the credit program was eliminated, there would be no change in participation or contributions to the cooperative.
• It doesn’t really affect quality
• Some libraries do the work anyway regardless of incentives
• Abolition of incentives would be a financial setback for some institutions
• What is the motivation of the major contributors in participating? For sure, it’s the pride of creating good records. But managers are watching the bottom line.
• Incentive program was important at one time but not now
• Doesn’t really affect quality
• None at the table stated that the credit influences participation in a significant way. It is not a line that is drawn at the time of budget prep or selection of OCLC services.
• Some libraries don’t participate on purpose - - easier to concentrate on local workflow and not just altruism

**Shared values**

• It is not fair to offer credits to some members of the cooperative and not others. The cost is 10% of the revenues – better to reduce subscription costs and make a level playing field.
• We aren’t going to enhance the records without an incentive.
• Our country has a sharing culture: you give and you receive. This pre-dates OCLC and WorldCat.
• An incentive program that awards ordinary behavior is not needed.
• The credit system runs counter to many of the shared values
• Catalogers are picky—whether for 10 cents or $100
• Asia Pacific Regional Council mainly represented at the table - - we do not participate. One North American participant noted that their contribution is small and the incentive program is not material. So we emphasized the global fairness
• We could not define “baseline” membership. We felt the shared values and membership principles emphasize common good - - all benefit by continuing.
• There are probably risks of perverse behavior in current system - - unnecessary work. Why not make contribution easy? Batch loading is reserve-incentives as is online work. One library (UNSW) working on OAI-PMH with OCLC.
• In Australia, incentive scheme discontinued 13 years ago. Librarians in AU maintain holdings on libraries in Libraries Australia and WorldCat - - it is in their interest to do so, and is a shared value.

**New program**

• Why any incentives at all?
• Use this money to reduce operating overhead.
• Data analysis is needed to find natural breakpoints - - proportionate costs by size, type or identify outliers who provide extraordinary levels of service (cataloging, ILL, apps).
  o Let’s not pay people to do what they would do any how under the values of the cooperative - - “plus” of promoting participation, but a minus as well.
• We used to recognize the millionth record milestones - - those were incentives.
• Whatever replaces it should be certain to recognize all types of libraries.
• Let’s publicize lists of the “Top 10” - - by type, size, etc.
• We’re talking about stories versus counts.
• Have recognition come for the Global or Regional Council - - this could help get libraries involved.
• Let’s have a “Recognition Program” that would recognize contribution
• Position the sunset of the current program as reapplying the investment for increasing small library involvement in OCLC.
• Should consider alternative recognition programs
• It’s more important to keep prices low for everything or give a “lifeboat” to current incentives
• A minority report:
  o Give incentives for entrepreneurial activity such as new apps
  o Need to consider in light of entire financial picture, including possible membership fee
• We thought early adoption could receive some incentives
• Letters, league tables, letters to presidents, etc. People like being congratulated.
• Development of applications that a wider volume/variety of libraries could use
• New incentives: new apps, pilots.
• Incent new and different things
• Maybe I-Tunes model for vetting

Other comments and questions:
• Consider in relation to a member fee?
• Won’t incentives make prices go up?
• Beta Test sites would be an example of “extra” above and beyond behaviors and incentives
• Apps – OCLC host a “certified” site where they could be sold would be an incentive. Why are there any incentives at all?
• What is the value added annually?
• What is the total value of WorldCat? What would it sell for? (Rights and Responsibilities)
• What is the value to contributors?
• What is the cost for OCLC headquarters for improving WorldCat versus the institution of members doing that?
• Who are we cataloging/updating for? Ourselves or the whole world?
• Consider how much lower costs are today compared with before computerization/OCLC
• Might mean that couldn’t purchase WCL
• Reduction of CONTENTdm pricing
• Keeping differential pricing is important
• Look at how other non-profit cooperatives work
• Some discussion that access itself is an incentive, e.g. foreign language records and other unique records
• Exploration of ideas about activities that may be eligible for an incentive of some kind
• Further research deemed beneficial to members, e.g., object linking for museums and archives
• Paid fees to attend GC